



Chapter Dispatch

December 2007

Volume 5 Issue 59

Important dates:

December 31 SOP Public Comment Period
2008 CALENDAR

December 31

January 15 IRS Reports Due

January 15 Treasurer Reports

February 14 CMOY/AOSE Award Nomination Deadline

June 19-23 18th Annual Conference Orlando, FL.

2007 Fall Member-Get-A-Member Campaign

87 members have been recruited with the fall Member-Get-A-Member Campaign. **Congratulations Rita Orlando and Christine Tocco**, they tied for Top Recruiter with 7 recruits. Recruiters with five or more recruits were Amber Caccarelli, Charon Dillard from Arizona.

When these new members joined CMSA during the campaign period, their recruiters received the following for their recruiting efforts:

- **FIRST RECRUIT:** A CMSA Member pin
- **EACH RECRUIT:** A \$5 CMSA coupon for each person recruited
- **FIVE OR MORE RECRUITS:** One free year of CMSA membership
- **TOP RECRUITER:** A complimentary Denver 2007 conference registration

Chapter Excellence & Innovation Award Program

Enter your chapter's best projects in CMSA's 2008 *Chapter Excellence & Innovation Awards (CEIA)*. Entries will be accepted from **January 1 until Feb 29** Visit www.cmsa.org/professional/awards/ceia/ to find out more and to download award entry forms.

Judged by impartial individuals outside of CMSA according to set criteria, the CEIAs recognize chapters that embody CMSA's Mission – *Advancing Case Management!* Recipients of these awards will be recognized at the Orlando 2008 Annual Con-

ference for promoting the growth and value of case management and supporting the evolving need of the case management professional.

Tips on Entering the Competition:

Fill out the entry forms as completely as possible. Judges look at the description on the form, so provide information as completely, yet concisely, as possible. Supporting reports, brochures, videotapes, and photos are optional, but welcomed.

Concentrate on the goal, its impact, the outcome and significance of the success. While numbers are very important, also include how the activity improved the lives of those involved or the community at large.

Chapter Excellence and Innovation Award Categories:

- Best Use of Technology
- Conference
- Educational Programming Membership Development
- Print

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Your Chapter's Fiscal Period

All CMSA Affiliated Chapters fiscal year just concluded August 31. For some of you, this means a time to transition officers.

For all of you, this means it is time to begin planning and strategizing for the next fiscal year. Financial reports for the past fiscal year should begin being



Reports deadline is January 15. Start to-

compiled. Budgets costs for the next year should be discussed now.

For more information on the financial obligations of the organization, please review the

Treasurer's Guide at: www.cmsa.org/PDF/Chapters/ChapterTreasurerGuide.pdf.

This is also a good time to set chapter goals and reflect on past year's accomplishments.

Reports deadline is January 15. Start today!

Officer Update Form

Many chapters have recently undergone elections for a new term. Please be sure to get the names, titles and email addresses of these new officers, board members and committee chairs to CMSA National to update the Leadership Database.



spondence, reports, chapter checks disbursement,

This information is used to determine who to include on corre-

chapter contact information, etc.... For the official Officer Update Form, please visit www.cmsa.org, under Membership, then Chapters, then Chapter Resources. Please complete mail, fax to 501-221-9068, or email to njackson@acminet.com.

CSC Registered Agent Invoices

In July, CMSA's Registered Agent (Corporation Service Company or CSC) mailed an invoice for services to each affiliated chapter for this next year, **beginning Sept 1, 2007 to Aug 31, 2008.** Corporations are required by the DC Statute to engage the services of a registered agent. Also, most states require that you have a registered agent

when you incorporate within your state, as well. Each chapter is incorporated in DC as a Domestic Corporation but in your state, you would be registered as a Foreign Corporation. Your invoice may reflect services for DC (Domestic) and maybe local (state) fees (Foreign) – if you used CSC for the local agent.

The invoices might have gone to your chapter Treasurer, President, or Executive Director. Please make sure that these invoices are passed along to the proper person for payment and processed to keep the chapter in good standing with DC. This is very important!

Nominate your Local CMOY & AOSE Award

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Take a moment to nominate your peer for a Case Manager of the Year (CMOY) award or Award of Service Excellence (AOSE). The deadline is **February 14, 2008**. Each year at the annual conference, CMSA presents these two prestigious awards to members whose case management careers elevate professional stan-

dards, enhance individual and leadership performance, and exemplify merit and distinctions. Visit www.cmsa.org Click on "Your Career" then on "Awards" to download forms and view previous award winners. That special case manager deserves and award, so why not help recognize a deserving

CMSA member who has significantly impacted the field of case management. Contact CMOY/ AOSE Staff Liaison Michele Lee at mlee@acminet.com (501) 225-2229 ext 1120

Snap for Seniors

**New Member
Benefit**

The CMSA Senior Housing Locator, powered by SNAPforSeniors is a **member only**, online management tool which allows you to quickly and easily find the senior housing options which best fit your client's specific requirements.

Save Time- A single database of 65,000+ senior housing facilities in the U.S. eliminates the need to consult multiple sources. Search for nursing for nursing homes, assisted living facilities, CCRCs, Residential care homes and more with a click of the mouse.

Stay Current- Facility information is regularly updated and maintained form more than 200 data

sources ensuring current information despite the 20% annual turnover in senior housing providers.

Improve Outcomes-

Advanced search options yield tailored results, translating into a better fit between prospective residents and facilities. Search by criteria such a geographic location, license type, facility names, availability status, payment types, care services and lifestyle amenities.

Maintain Objectivity-

All facilities receive free listings, eliminating the bias that many referral services and advertisement-based websites possess.

A growing number of facilities have detailed listings comprised of 150+ data elements, some displaying photo galleries, virtual tours and current availability.

Visit [Case Management Society of America > CMSA Senior Housing Locator](#) for more information

Chapter Presidents Council

The Chapter Presidents council Representative nomination packets will be sent out in January 2008. This liaison position is the voice for the chapter leaders to the National Board and shares industry issues, requests, needs, and solutions related to chapters. This position is elected by the Chapter Presidents in March 2008. The Term of Office will begin June 2008 during CMSA's Annual Conference. **As the CPC Representative the person elected will serve on**

the Board of Directors, the following minimum criteria apply:

- Case manager "A" member in good standing by the date of election (March 15, 2008).
- CMSA member for two (2) years by the date of election (March 15, 2008)
- Individual must be serving as president or Pres-Elect of a fully affiliated chapter and be in office of President on the day of election (March 15th).

Nomination of a vice President will be accepted if this is the office that assumes the presidency as of this date.

- The newly Elected CPC Representative will close the CPC meeting at the Annual conference with a five minute overview of goals for the up coming year.

Local Chapter Directory

Visit cmsa.org and click on membership, then chapters, then local chapter's directory. Review the information for your chapter to make



sure it is current and up to date. This area can be used to post meeting and event announcements, in addition to your local chapter's websites. As current and perspective members of CMSA visit the website

they will be able to view events happening in their area. Send updates and notices to njackson@acminet.com.

Commit your organization to at least one new board member orientation per year. Items to be covered: introductions, mission statement, responsibility, financial statement walk

through. Richard Maladecki

Introducing the New Company Membership Portal

The national office will be launching a new company portal. We are excited that this new feature will be added soon. This new portal will assist companies to manage their own accounts at their convenience. The account manager will be

able to add, remove, and invite new to their account at any time. This will be a great talking point for recruiting new company memberships. To find out more information on Company Memberships visit [Case Management Society of](#)

[America > Membership > Company Membership.](#)

SOP Public Comment Period

The Case Management Society of America is soliciting comments on The CMSA Standards of Practice for Case Management - Revised 2002 (SOP). The SOP Committee is preparing to undertake the next revision of the SOP (2007-2008). Specifically, the committee would like you to make com-

CMSA



ments regarding elements within the current SOP that should be changed, added or deleted. The committee will review and consider all input from the public comment period following their official launch November 14 and will close November 26, 2008. For the first time, the SOP review committee will also consider

input from a broader perspective (i.e., social work, military, etc.) and encourages your participation in this important project.

This public comment period has been extended, and will end at midnight (Central Time) on December 31, 2007.

Follow the link below for more information on submission.

[Case Management Society of America > Public Comment > SOP](#)

18th Annual Conference



Save the date June 17-21. CMSA's 18th Annual Conference & Expo is

the largest case management event of the year and an exclusive opportunity for you to connect

with over 300 companies that will be available and ready to share knowledge, insights, and cutting-edge solutions. Our educational sessions will engage your unique abilities to move from "what is" toward "what can be." You're invited to join us on this incredible journey

as we create new ways to add professional value, develop critical thinking skills, enhance careers and learn experientially. This conference will be your source of cutting-edge practical advice, proven strategies, and how-to guidance.

Letter from your CPC Rep



It's been great to see the discussions and sharing on the CPC Forum. I hope you're enjoying Peter's updates regarding what national is doing. Please carry the exciting news and updates back to your local chapters so they too may understand the tremendous strides that CMSA is making as it brings CM's "to the table" on many fronts. If you ever need additional clarification, please contact Peter, myself or the national office.

Remember, the scheduling format for the 2008 Orlando Conference has changed in response to memberships/ attendees requests. This entails the Leadership Forum with National Speaker on Tuesday morning with the Conference itself opening on Tuesday afternoon and concluding on Friday. In addition, I'm pleased to also inform you that the Chapter Leaders are invited to an informal session that Monday evening, to network, share and learn from each other. So PLEASE, as you prepare your budget and schedules for next year, anticipate including this HUGE opportunity for your chapter leaders to participate with others from across the nation. Both years that I've attended, I've come away amazed at the varied formats, programming and diversity that is evidenced and shared at this meeting. I believe the Monday night session will definitely compliment your experience. PLAN NOW to see US there!

As your CPC Rep to the CMSA BOD, I'm on the Education Committee. We are currently reviewing the 2007 Denver offerings in preparation to upload them to the website, in the Educational Resource Library. Soon your colleagues will be able to share and earn CE's for those sessions you raved on about! Also, you may want to download and listen to some of the sessions that you were unable to attend because of time conflicts. Remember by completing the Post-test you can immediately print a CE certificate. That CE information is saved on line for you and BEST of ALL, it's FREE as a MEMBER BENEFIT!!- I believe this is one of the Best Kept Secrets of CMSA- but it shouldn't be a secret- make sure all your chapter members are aware of this. If you have questions or need assistance please contact national office for further information on accessing the library- it's a simple process, and only requires an initial CMSA profile setup, which many already have completed, for continued access.

I'm still looking for several volunteers to help finalize information for the Speakers List, so just e-mail me now and we'll be glad to include you in the fun! cherylhumphrey@comcast.net

Enjoy this wonderful winter season, and remember to join in the CPC Forum discussions.

Cheryl

Chapter Highlights

Hartford, CT

The Connecticut Chapter held a very successful conference at the Crowne Plaza hotel, Cromwell on October 3rd 2007. Presenters were Adam Jeamal from Governor M Jodi Rell's office who presented a proclamation declaring October 7th to 13th Case Managers week in the State of Connecticut. Also present was Peter Moran, National president who brought greetings.

They had some very dynamic speakers who spoke on a variety of topics which included *Major Depression Disorder- A Step Wise Approach to the Treatment of Depression*, presented by Richard Fahey sponsored by Cyberonics; *Dancing with Dragons: Legal Pitfalls of Documentation for Case Managers* which was presented by

Attorney Diane Fernald; Healthcare; *Heart, Health & Nutrition, Holy Grail of Cardiology* presented by Stephen Sinatra, MD. A panel discussion: On Elder Law, Elder Care with Panelists-Phyllis Boynton RN, CCM, MPH, and Attorney Paul Czepiga, with moderator—Maureen Fiore, RN, CCM; *Advances in Lower Extremity Prosthetic Technology* presented by Nathan P. Seversky, CP.; *Continuity of Care for the Transplant Patient* presented by Catherine Mulhahy RN, MBA. The day ended with a presentation titled *Positive Mind & Healthy Body* presented by Bernie Siegel MD who kept the audience glued to their seat.

Thank you to all their attendees and vendors who reported back on their evaluation that this was



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Connecticut's "best conference" yet. A special thanks to their Sponsors Genentech, Roche, Hanger, Cyberonics, Utopia and Genesis Healthcare.

Phyllis Boynton (past treasurer of the Chapter) was awarded the Case Manager of the year Memorial Scholarship award.

Their next conference will be Spring 2009 and in 2008 they will be celebrating their 10th anniversary with a Special networking dinner cruise for their members.

They will not be having any educational programs in January and February 2008 due to inclement weather. Programs will recommence in March 2008.

HAPPY HOLIDAYS.

Chicago, IL

CMSA Chicago is busy with monthly educational meetings and preparing for our yearly conference.

Our monthly meetings are the second Tuesday of the month at various restaurants around the city. Our annual conference will be held April 8th. At our December meeting we had a Toy for Tot's toy drive in lieu of the price of

dinner and our sponsor covered the dinner. This was a popular idea. We take the month of January off due to inclement weather in the midwest and will begin our regular meetings again in February.

Grand Rapids, MI

The Great Grand Rapids/ Kalamazoo Chapter has been working diligently on their strategic plan. During a strategic planning retreat the areas of importance and how the membership could best be served were discussed. Chapter meetings were also planned for the next year, with educational offerings at each meeting that would

meet the needs of the Case Managers, Nurses and Social Workers. Six areas of importance were selected and committees formed to put forth a plan of action. The areas of focus include: Marketing, Membership Services, Education, Practice Standard, Legislative and Newsletter. The membership committee continues to retain current members and recruit new members, and help prospects distinguish advantages of mem-

bership with CMSA. Within Practice Standards it was thought to be important to educate the importance of CMSA Standards of Practice and how the role of a case manager can benefit the client. In order to better educate the membership, the newsletter will be utilized by reviewing portions of the Standards of Practice and integrating topics within the speakers of the chapter meetings.

New England

With a new board installed and under the direction of President, Karen Coish Mackey, the CMSNE Executive Board, recently completed a two-day retreat, where goals for the future of the chapter were developed. These goals will help the organization move forward and continue to meet the ever-changing needs of our membership. Based on the results of a recently completed membership survey multiple long and short term goals were developed. The most significant feedback from our membership was that they were looking for additional educational opportunities that would involve a more extensive use of technology, to include teleconferencing and web-based programming. To this end the Executive Board agreed to make an investment of chapter funds and hire a technology consultant to help develop a plan that would move CMSNE into the future electronically. The consultant will be charged with suggestions for updating the chapter website, direction of

teleconferencing and web-based programming and moving the communication of the board and committees electronically into the future. It is the hope of the board that we will be able to offer educational programming that will meet the needs of our membership across the 4 state geographic region that we cover.

In addition to addressing educational concerns, the board developed goals to work on:

- Ways to reward and recognize members who volunteer on the board and/or on committees for the chapter
- Outreach to new CCM recipients
- Outreach to hospital Directors of Case Management
- Continuation of a year long social initiative providing educational opportunities to our members via association with a national organization
 - this year's initiative will focus on Traumatic Brain Injury
- Maximizing chapter's financial re-

turn on investments

- Continue with the publicity and distribution of CMSNE's Public Relations Packet to new and prospective members

The chapter is currently working on the details of its 9th annual Building Strategies for Success conference which will be held in March 2008, this full day program will feature nationally known speakers which will address ethical, self help, communication and stress/time management issues. Also in the works are details regarding our 19th Annual Conference which is scheduled for October 2nd and 3rd at the DCU Convention Center in Worcester, MA. The annual conference theme is in keeping with the CMSA national initiative of transitions of care and will address a collaborative relationship amongst case managers in these various settings can provide a smooth transition for the patient across the continuum of care.

Las Vegas, NV

They held their annual holiday event, Tuesday, December 4th at University Medical Center, which was sponsored by Rancho Rehab, part of University Medical Center. They introduced the new officers and board members for 2008/2009 which are all Certified Case

Managers. They went over the goals for 2008 of: developing a website; providing lunch and learns for various organizations that have case managers to provide information on CMA-LV and CMSA so to grow our membership; provide CEU;s for CCM's and social workers; continuing our CCM class to provide information and lectures to help prepare for the CCM exam. The

next educational event is scheduled, Tuesday, January 15th on Transplants.

Albuquerque, NM

The Rio Grande Chapter of CMSA held their annual educational seminar Case Management a window of opportunity on October 4 & 5, 2007 at the Wyndham Hotel by the Albuquerque airport. And what a rainbow it was! The presentations covered a range of clinical subjects such as the cyanotic infant, obesity, autism, and the medical management of diabetes to addressing the case management needs of our returning United States soldiers. The presentations also addressed the health-care needs of the homeless, the FOCUS program at UNMH, communication skills, long term care insurance and retirement planning, and finally, to being intentional with your time and team building. The full spectrum of that rainbow called case management was covered!

Thank you to all of the wonderful speakers. Local physicians, Robert Ferraro, MD, Brian Moore, MD, Cynthia Arndell, MD, Patrick Boyle, MD, Julie Sierra, MD, Andrew Hsi, MD, and Elizabeth Weil, MD were

joined by Dr. Jack D. Schim who gave a lunchtime symposium on Migraines and Hyperhidrosis. Other local experts included Gary Oppendahl, Pamela S. Davis, Mary Ellen Gonzales, Marjorie Buck and Penny Thompson. A special thank you to Margaret Chu for making the trip to New Mexico to present and to enjoy our International Balloon Fiesta and to the group panel that covered for Laurence Bussetti.

Once again, a "celebration hour" at the end of day one of the seminar to celebrate Case Management Week. Governor Richardson proclaimed Case Management Week in New Mexico to coincide with the national week of recognition. This year we raised the level of excitement by giving away door prizes including the grand prize for the celebration hour of an LCD television!

As always, our seminar was made possible by the support of our wonderful community partners. Forty-five participated this year and many have already committed for 2008!

Thank you!

Thank you to all of the seminar

committee members and volunteer too.

Some of the comments that were received on our satisfaction surveys included:

Speakers are all high caliber & very passionate about their subject matter

Excellent and interactive presentations

Good presenters and learned from each one of them

Thank you for an informative and inspiring day

I think this has been as good as the National Conference

The conference was very well put together and orchestrated

And the best for last:

Over my thirty years of professional practice, I have been to many conferences. I have also been a part of the planning and organizing of a fair number of conferences. With that background, I want to say this has been a "Top Shelf" Conference. Great work ladies!

Wodbridge, NJ

The CMSA New Jersey Chapter had a record turnout for their November dinner meeting with over 150 in attendance. The draw was the topic of "Medicare and Medicaid Services' (CMS's) Plan for Nonpayment of Hospital Acquired Conditions" presented by Dr Andrew Miller from Healthcare Quality Strategies. The presentation was di-

rect and to the point since it is based on the Deficit Reduction Act of 2005 that will become effective October 1, 2008. The Act will directly impact care coordination and reimbursement in acute care facilities. The presentation was very interactive since it yielded an extensive questions and answers period, with most of the questions posed by the number of acute care practitioners in attendance.

The following is a link to the US Department of Health and Human Services website where there is an broad description of the new Act <http://www.cms.hhs.gov/HospitalAcqCond/> The New Jersey chapter would like to wish all CMSA chapter members a happy and healthy holiday season!

Long Island, NY

CMSA LI had a very successful and well attended December holiday meeting with CMSA National President Peter Moran, RN,C, BSN, MS, CCM, as its guest speaker. The turn out was great.

Peter updated the audience with National CMSA's many exciting projects and initiatives,

including Case Management CPT Codes, Standards of Practice revisions, and much more. His presentation on ER Case Management: Incorporating Standards into Practice Outcomes: Case Studies was excellent and extremely well received

Cincinnati, OH

The Southern Ohio Valley Chapter CMSA Board and others recently spent 2 and a half information-packed days at their first Annual Leadership Retreat. The weekend seminar included many dynamic speakers and thought-provoking sessions to help the chapter's current and future leaders gain insight into effective leadership. Speakers included Tim Durkin, Nancy Skinner, and BK Kizzar. Participants learned so much and gained a new vision and direction for ongoing chapter leadership.

In addition, SOV-CMSA, Sandra Lowry, and CCMI Associates presented "Preparing for CM Certification" September 14 and September 15, 2007. Practicing case managers from Ohio, Kentucky and Indiana attended the course. This was their first opportunity to sponsor a CCM Exam Preparation Course and it was a great success!

They also launched their premiere edition of their chapter newsletter "Chapter Chatter" which met with rave reviews!"

Plans have been finalized for the Third Annual Occupational Health and Acute Care Case Management Conference "Yesterday, Today, &

Tomorrow" February 9, 2008 in Mason, Ohio. Speakers include Peter Moran, President CMSA; Connie Commander, Immediate Past President CMSA; Susan Rogers, Past President CMSA; Kevin Carroll; and Lisa Linn Siefert. Presentation topics include: MRSA Anti-infective Insights; Overview of Bariatric Surgery and Associated Nutritional Risks; Successful Rehabilitation of Persons with Limb Loss; Employer's Perspective: Case Management Opportunity; and ER Case Management: Incorporating Standards into Practice, Outcomes: Case Studies.

Dallas, TX

The DFW Chapter celebrated the holiday season by collecting unwrapped toys for the "Toys For Tots" campaign sponsored by the US Marine Corp. It's going to be a happy Christmas for a lot of children in the metroplex this year!

The annual Chapter Holiday Party was held on the 11th. The Southlake Hilton at Towne Square served as the backdrop for a mouthwatering buffet and wonderful networking with members, non-members and industry

leaders. The theme of the party was "Casino Night". Gaming included roulette, blackjack, poker and craps. Everyone was a "high roller" and enjoyed a grand evening.

The DFW Chapter is looking forward to 2008 with excitement and anticipation! Some of the events that are being planned include:

- One Day Seminars on the Road (Lubbock & Tyler)
- CCM Prep Classes
- 16th annual Educational Conference
- 4th annual Invitational Leader-

ship Retreat

- Fall Seminar
- Board of Directors all day retreat

IT'S GONNA BE A TERRIFIC YEAR!!!

The 7 traits of Effective Leaders: How Many Do You Share?

Are the leaders born or made? Can you lean superior leadership skills? No one is sure, but experts have noticed seven specific actions that successful leaders carry out, regardless of the organization or cause, they lead.

Effective leaders....

...Make others feel important. If your goals and decisions are self-centered; followers will lose their enthusiasm quickly. Emphasize their strengths and contributions, not your own.

...Promote a vision. Followers need a clear idea of where you're leading them, and they need to understand why that goal is valuable to them. Your job as a leader is to provide that vision.

...Follow the Golden Rule. Treat

your followers the way you enjoy being treated. An abusive leader attracts few loyal followers.



...Admit mistakes. If people suspect that you're covering up your own errors, they'll hide their mistakes, too, and you'll lack valuable information for making decisions.

...Criticize others only in private. Public praise encourages others to excel, but public criticism only embarrasses and

alienates everyone.

...Stay close to the action. You will need to be visible to the member so of your organization. Talk to people, visit other office and work sites, ask questions, and observe how business is being handled. Often you will gain new insights into your work and find new opportunities for motivating your followers.

... Make a game of competition. The competitive drive can be a valuable tool if you use it correctly. Set team goals, and reward members who meet or exceed them. Examine your failures, and celebrate your group's successes.

- Adapted from The Toastmaster

Financial Accountability

Here is a helpful website for chapter treasurers. Check out this excellent resource for non-accountant treasurers.

Here is an excerpt from their newsletter which is available by request at: www.nonprofitcentral.biz

Financial Accountability

Procedures to consider:
 Prepare your annual budget to reflect the values and mission of your organization.
 Review your budget regularly and change course if necessary.

Have bank statements sent to a board member other than the treasurer.

review the group's financial records. At least one per year.



Comply with governmental and other reporting requirements, such as 990/EZ, annual corporate reports, etc.

Make plans today to ensure that the interests of your group are protected.

Establish an emergency fund to cover unexpected expenses or fundraising shortfalls.

Identify an audit committee and perform regular audits to

The MoneyMinder Team
 phone: (866) 346-4300
 web: <http://www.nonprofitcentral.biz>

Ask Barbara

This is was a question was asked by one of the chapter leaders in preparation for the Holidays, with all of the holiday party's coming up.

The importance of taking appropriate actions to limit liability resulting from someone overindulging during group functions or while on business

It is important for groups or organizations, to adopt policies, preferably the organization's board of directors and honored by all in positions of responsibility, to help limit the organization's potential liquor liability.

In approximately half of the states, the courts have developed a "host liability" standard for assessing liability. As with the better-known dram shop liability, anyone who provides alcoholic beverages to an intoxicated individual or to a minor runs the risk of being held responsible for liability they may cause even though they are not a licensed seller of the liquor. This is based on the duty the host owes to third parties who may suffer damage as a result of the host's liquor generosity. What this means is that the sponsor of the event has a duty to third parties to prevent someone who has attended a function who has become intoxicated from causing injury or damage to a third party. The courts have generally held the host liable when the events seem to indicate he has failed to take advantage of opportunities to prevent the person from becoming intoxicated and driving or engaging in some other activity that endangers themselves or others.

For organizations and meeting planners this places an additional burden of risk management. Two common ways to help manage this risk are to include contractual language limiting liability relative to the serving or sale of alcohol with the facility where the event is held and secondly to maintain adequate insurance that covers potential host liquor liability. However, it is not always possible to limit liability contractually in, for example, a hospitality suite setting. Therefore, in addition to these, the organization should also establish definite policies and service requirements, such as:

1. Only use bartenders or servers who have been properly trained.
2. Always also have non-alcoholic beverages available.
3. "Card" people who may appear to be under age.
4. Establish designated driver programs, as appropriate, and provide for rooms if an overnight stay is needed to sleep it off.
5. Have non-salty food available.
6. Encourage people to drink responsibly with signs and in registration materials and remind them of the severe penalties intoxicated individuals may face.
7. Avoid open, unattended bars.
8. Close bars in advance of the end of the event.
9. Limit the time of the event or hours of the hospitality suite.
10. If it's a cash bar, offer free non-alcoholic beverages.
11. Sell or provide a limited number of drink tickets.
12. Monitor the event.
13. Designated staff should not imbibe, they should supervise.

Following the above-recommended precautions will not ensure that organization will not be sued should someone who has attended one of its functions and over imbibed then injure or kill somebody or themselves. However, they will help prevent that from occurring and help the organization from being found liable for damages, and they will also likely result in a more favorable public reputation for the organization, not to mention saving it substantial money, which can then be better used to promote and improve their industry.

The only way to protect the organization, its members and innocent third parties is for the organization to take a stand in favor of responsible alcoholic consumption at its functions.



News From CCMC

All future CCM exams to be administered in electronic format

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To access the Certification Guide and Application, please visit the CCMC's website at www.ccmcertification.org.

CCMC is partnering with Prometric to deliver the certification examinations electronically, starting with the Fall 2008 examination cycle.

There are many benefits to computer-based testing (CBT):

- **More flexibility in site locations.** Previously, only 65 exam sites were available. Now there are over 300 locations nationwide for you to schedule at a location convenient to you.
- **More flexibility in choosing when to take the exam.** Rather than requiring you to take the exam on a particular date and time, you will have your choice of seating over the course of a week-long window.
- **More opportunities to apply.** The exam will be offered in three windows per year, as opposed to the two dates currently offered.
- **Shorter exam.** Prometric has demonstrated that the exam can be shortened without sacrificing examination reliability or validity. The current 6-hour exam will be reduced to approximately 3 hours.
- **Faster results.** Rather than waiting two months for your scores, you'll receive your score report approximately 2-3 weeks following the exam.

Since 1993, the CCM has been the gold standard in case management certification, with over 26,000 certificates nationwide. Offering a reliable computer-based examination will provide increased service to our candidates.

APPLICATION PROCESS UPDATE

Streamlining will simplify the application process

With the ability to offer exams three times per year, CCMC will also streamline the application process. The new application (available in February 2008) will contain all forms required for certification:

- Application
- License Verification Form
- Employment Verification Form

Rather than requiring a separate application and examination fee, only one fee will be submitted for the entire certification process. A partial refund for those not found eligible to sit for the exam will be provided.

This will greatly reduce the steps and challenges applicants have reported in the past in meeting deadlines and obtaining their employment documentation and other verifications. More improvements to the process are anticipated, and will be announced in February.

If you have questions or need more information, visit the website (www.ccmcertification.org) or email at info@ccmcertification.org. Please forward this information to those who may be interested.